Fermilab

Computing Sector

Project Closeout Report

"iTrack"

Version 3

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CONCURRENCES:

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Project Sponsors	Date	Head, CCD	Date

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Revision Log

Revision	Description	Effective Date
1	Original document	2013-03-12
2	Comments from J. Bakken and W. Boroski	2013-03-14
3	Comments from J. Heyes and J. Bakken	2013-03-15

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1. Project Abstract

As part of the Laboratory's Contractor Assurance System (CAS), we built an Issues Tracking system for enterprise-level issues. These issues originate from external reviews and audits and from internal sources, including issues the Assurance Council designates for tracking.

2. Project Documentation

Documentation of the project, including charter, status reports, and this closeout report are in the iTrack section of the Computing Projects SharePoint site. The charter and closout are also in the CS DocDB as document number 4910.

3. Supporting Documentation

The Users' Guide documents the use of iTrack form the entry of new reviews to the closing of corrective action plans and milestones. The Administration Guide covers managing of privileges and creation of new review types and their terminology. Both of these are in the CS DocDB as document number 5051.

4. Reason for Closing the Project

The project completed all the objectives in its charter. Co-sponsor Jed Heyes (of OQBP at the outset, now of ESH&Q) has accepted delivery of the product. (See also Section 11, Next Steps.) Udaya Manikonda has accepted Service Ownership by the Enterprise Applications group.

5. Project Deliverables

The project delivered a tested system for entering, updating, and reporting issues and corrective action plans. Development, integration, and production instances exist. The system issues reminders and alerts. Documentation of the use and maintenance of said system is in DocDB and the ServiceNow knowledge base. The Service Desk has been informed how to route tickets regarding iTrack.

The first users have been trained in the course of the user testing of iTrack in the integration instance. In addition, we held some user feedback sessions comparing iTrack and frESHTRK.

6. Project Schedule

The project planning was begun in August, 2012. The project charter received its final signature October 16, 2012, about three weeks later than planned. Stakeholder engagements, design, requirements, and development were all completed on the original schedule or early. The test plan, testing (especially user testing), and production deployment were all approximately one month late. Delivery of documentation for users and application administrators was nearly three months late.

7. Project Team

The project team did not change throughout the project: Kevin True as analyst and Matt Arena as technical lead. Matt Crawford was the project manager and co-sponsor with Jed Heyes.

8. Budget and Financial Information

Salary, Wages, and Fringe (SWF)	Budget (FTE-yrs)	Actual (FTE-yrs)	% Spent
Fiscal Year 2012	0.16	0.04	27.0%
Fiscal Year 2013	0.17	0.24	140.8%
Total	**0.33**	**0.28**	**84.8%**

Materials & Services (M&S) Obligations	Obligations ($)	Actual ($)	% Spent
None	$0.00	$0.00	N/A
Total	**$0.00**	**$0.00**	**N/A**

Materials & Services (M&S) Budget	InitialBudget ($)	BAC ($)	EAC ($)
	$0.00	**$0.00**	**$0.00**

Notes to SWF: BA time was never budgeted. PM time was budgeted in FY 2012 but not FY 2013. Actual column shows reported time, not adjusted, and includes BA, PM, and developer.

9. Outstanding Risks

There is a worry that users and a possible future auditor might view iTrack and frESHTRK as two separate issue tracking systems for the laboratory, and that this might be considered a negative point. Jed Heyes is leading the creation of a proposal to create a single interface that includes all wanted features of each accessed by the selection of Review Type or some other mechanism. There is also the risk that additional feature or function requests emerging as a results of current feedback may significantly delay adoption of the new interface by users as evidenced by the delay in entering QA assessments and CAPs at the request of the COO and the Head of the ESH&Q Section.

10. Operations and Support

Several management systems will eventually want their tracked issues shown on FermiDash. We have two examples of that work already, in Science and Quality, so additional instances will not be difficult.

Incident and Request tickets concerning iTrack will be routed to Enterprise Applications. Database support for the iTrack interface is the same as for the frESHTRK interface as it's the same database.

11. Next Steps

Before use of iTrack becomes widespread, we need to make a change so that the head of the responsible Division or Section is not *necessarily* the one notified when any item is added to a review in iTrack. This was a late requirement made by the COO.

In addition, a change order or a separate small project may address the iTrack-vs-frESHTRK situation mentioned in Section 9 above.

12. Lessons Learned

We needed the coordinated involvement of about eight people who were not part of the project and not in the Computing Sector. Their time proved very hard to schedule and we did a lot of reminding and waiting. Any similar project in the future should get a time commitment from stakeholders at the outset and/or schedule longer intervals for those stages of the project.

Writing the documentation stretched out over a much longer time than planned. Project team members with documentation tasks will need to defend their time against encroachments and not let “mere documentation” slip to lowest priority.

Having a developer who knew ESHTRK inside-out was an asset. Developer effort was essentially never the bottleneck.

The charter and other project plans did not make note of the existing frESHTRK interface users—concerned parties who were not planned to be users of the iTrack interface, but who nonetheless turned out to have a stake in the outcome. In particular, we ought to have involved the owner of the ESHTRK database more than we did.